

CLIENT REFERRALS

(This standard does not apply to referrals or orders for clinical and health care made by licensed health care providers.)

AGENCY:

ITEM REVIEWED	YES	NO	N/A	✓ COMMENTS
A. ASSESSMENT				
1. Evidence that assessment of client needs includes:				
• prevention				
• clinical services				
• psycho-social				
• support services				
2. Policy for referrals for known or suspected child/elderly/disabled abuse or neglect.				
3. Policy for referrals of clients who make threats of suicide or violence against persons or property.				
4. Policy for referrals of clients with infectious tuberculosis.				
B. PERSONNEL				
1. Evidence that direct service personnel who make referrals for clients are trained/qualified to do so.				
2. Evidence that referral activities are included in the relevant staff job descriptions.				

ITEM REVIEWED	YES	NO	N/A	✓ COMMENTS
C. PROCEDURES AND PROTOCOLS				
1. Written protocols for:				
• referrals and follow up, including necessary releases from clients				
• reporting situations as mandated by law				
D. DOCUMENTATION				
1. Documentation in the client record/chart of referrals and follow-up				
3. COMPIS reports and back-up documentation indicating that referrals are reported in the COMPIS data system as required				
4. Current Memoranda of Understanding for referral linkages				
D. RESOURCES				
1. Evidence that resource information (e.g., Texas HIV/STD Community Resource Directory, local provider directories) is available to staff making referrals.				
E. FOLLOW-UP				
1. A policy and procedure for follow-up with the client				

ITEM REVIEWED	YES	NO	N/A	✓ COMMENTS
2. Method to assess client satisfaction with the given referral which will address incidents of negative feedback				
E. RECOMMENDATIONS				